



DISTINGUISHED
SELF-SERVICE

The Broker Portal

DOCUMENTS GUIDE





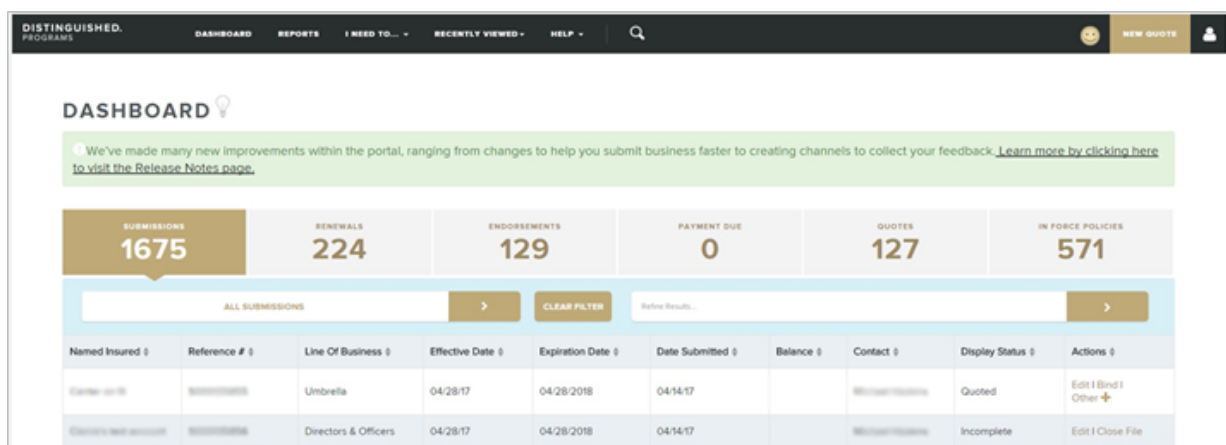
Document Retrieval

Through the Broker Portal, you can view and save documents associated with your account(s). Open an account, click “All Documents” and you’ll find documents related to that account. Follow the steps below to locate your policy and all associated documents.

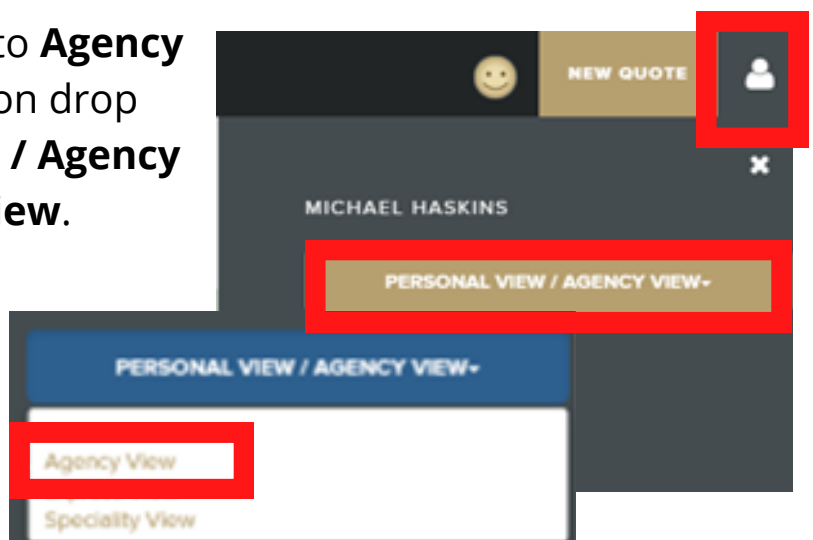
You will find the following types of documents within the portal:

- Policies
- Invoices
- Quotes
- Completed Applications
- Cancellation Notices
- Rescission Notices

1 Go to the **Broker Portal Dashboard**.



2 To see all accounts toggle to **Agency View**. From the account icon drop down, click **Personal View / Agency View** and select **Agency View**.

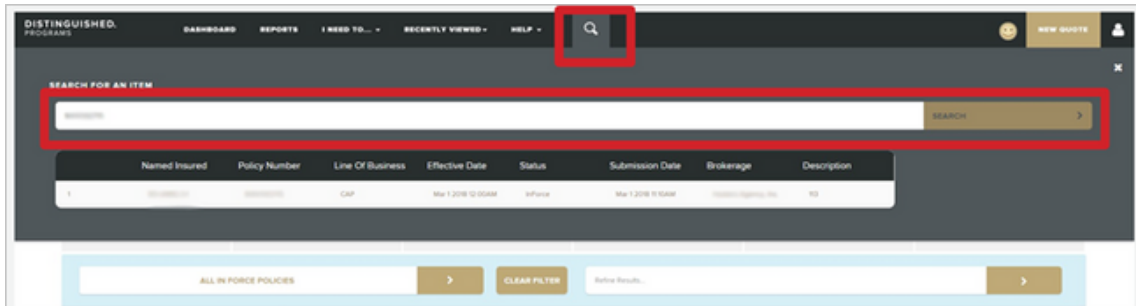




DISTINGUISHED SELF-SERVICE

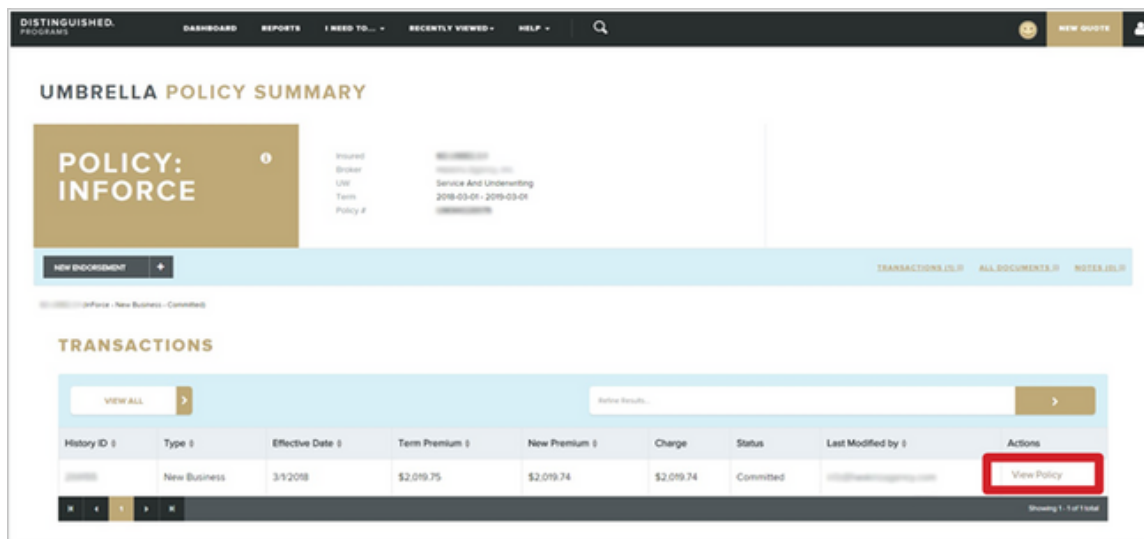
3

Click the **magnifying glass** to search for your **Submission** or **Policy**.



4

Click View Policy to open your **submission** or **policy**.





DISTINGUISHED SELF-SERVICE

5

Click **All Documents** and sort the list to find what you need.

- Click the **Creation Date** sort button twice to pull up the most recent date.

The screenshot shows the 'POLICY: INFORCE' page with a navigation bar at the top. Below the header, there's a 'NEW ENROLLMENT' button and a search bar. The 'POLICY DOCUMENTS' section contains a table with the following columns: Name, Policy Number, Policy Term, Creation Date, and Actions. The 'Creation Date' column header is highlighted with a red box. The table lists three documents: Quote, Invoice, and Policy - Specialty Cover Letter, all with a creation date of 2018-03-01.

Name	Policy Number	Policy Term	Creation Date	Actions
Quote [redacted].pdf	[redacted]	2018-03-01 to 2019-03-01	2018-03-01	Download File
Invoice [redacted].pdf	[redacted]	2018-03-01 to 2019-03-01	2018-03-01	Download File
Policy - Specialty Cover Letter [redacted].pdf	[redacted]	2018-03-01 to 2019-03-01	2018-03-01	Download File

6

Choose your document and click **Download File**.

The screenshot shows the 'POLICY: INFORCE' page with the 'POLICY DOCUMENTS' table. The 'Quote' document is selected, and the 'Download File' button in the 'Actions' column is highlighted with a red box.

Name	Policy Number	Policy Term	Creation Date	Actions
Quote [redacted].pdf	[redacted]	2018-03-01 to 2019-03-01	2018-03-01	Download File